

## Change Management Tasks

### DAILY:

#### 1. Monitor CMS-CM Mailbox:

- Review Daily Monitoring report
- Review mailbox items and forward to analyst as necessary
- Forward responses to Deloitte as necessary
- Follow-up with analyst if action is required but not completed on a timely basis
- File e-mail message in corresponding mail folder as issues are resolved

#### 2. IR Reports:

- Generate Daily IR report in the IR database
- Review IR report to ensure request has been researched and that adequate information is available for Deloitte to research and address the incident
- Copy reportable IR's to the CHESSMate database
- Generate IR report
- Distribute IR report at 3:00pm (via e-mail) to the following:

Deloitte Distribution: Paresh Shah  
Manish Jain  
John Hibbs  
Joe Puli

CMS Distribution: Traci  
Robin  
LaVorra  
Cindy  
Julie  
Carol  
Brenda  
Brian

### WEEKLY:

#### 1. CMS Net M & O Meeting (MONDAY):

- Facilitate CMS Net M & O Meeting scheduled each Monday at 2:00 pm.
- Generate CMS Net M & O Meeting agenda and distribute via e-mail to:

Distribution: Paresh Shah  
Manish Jain  
Bill White

cc: Bob Morthole  
Traci McCarley  
Robert Morison  
Jim Estes  
Deanna Gans  
Rick Wong  
Traci  
Robin  
LaVorra  
Cindy  
Julie  
Carol  
Brenda

- Generate and distribute meeting minutes

2. Deloitte Weekly Status Report (TUESDAY):

- Review and distribute Deloitte Weekly Status Report:  
Distribution: All ISU staff (including Bob's staff)
- Reconcile outstanding IR's to Deloitte's Weekly Status Report and report discrepancies

3. Change Requests (TUESDAY):

- Review incoming change requests
- Log in Change Request database
- Meet each Tuesday to review with lead analyst
- Meet with Policy Review as needed, to submit change requests requiring policy approval
- Forward response to user who submitted request
- Update change request database with status of request

**MONTHLY:**

1. Prioritize IRs for monthly Change Cycle

2. Change Cycle:

- Forward IRs/changes to assigned analyst to Test changes in System Test and UAT
- Update CHESSMate with testing results
- Update Release Testing Status Report with testing results (post to the share drive)
- Forward approval of release to Deloitte
- Post broadcast message to alert users that the system will be unavailable during change cycle implementation.
- Generate and distribute a This Computes! notification detailing the changes included in the release
- Schedule testers for implementation of change cycle

- Test implementation of release (scheduled for the last Saturday of the month)
  - Obtain copy of Release Notes from Deloitte
  - File hard copy of release notes and testing documentation
3. Deloitte Invoice
- Review draft copy of monthly invoice to ensure IRs and change requests have been completed.
  - Approval final invoice and forward to Bill for approval.
  - Forward approved invoice to Candie Saldana or Ron Valdez for processing and payment.
  - Post invoice to spreadsheet for budget tracking.
  - Post invoice detail (invoice date and hours billed) to the IR / Change Request database.
4. IR Database
- Review IR database for open unresolved incidents
  - Generate report and distribute to each analyst for review and update to the IR database

### **AS NEEDED:**

1. Data Repairs
- Verify data repairs in Production
  - Update and close IR in CHESSMate
  - Notify users that data repair has been completed
2. This Computes!
- Distribute This Computes! notifications to the following distribution list

Distribution: CMS Net Counties  
 CMS Net Counties 2  
 County Faxes  
 DHS CMS (Outlook Global Address)  
 DHS CCS Administrators Dependent Counties (Outlook Global Address)  
 DHS CCS Administrators Independent Counties (Outlook Global Address)

3. System Notifications:
- Distribute system notifications to alert CMS Net users of issues with CMS Net system

Distribution: CMS Net Counties  
 CMS Net Counties 2  
 County Faxes  
 DHS CMS (Outlook Global Address)  
 DHS CCS Administrators Dependent Counties (Outlook Global Address)  
 DHS CCS Administrators Independent Counties (Outlook Global Address)